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ABSTRACT

Following on its recent reports on alcohol advertising in national magazines and on television, the Center on Alcohol Marketing and Youth (CAMY) commissioned Virtual Media Resources (VMR), a media planning and research firm in Natick, Massachusetts, to analyze the alcohol industry's televised "responsibility" ads in 2001, using the same standard data sources and methodologies employed by media planning and buying professionals. While many alcohol ads include brief or small voluntary warnings, "responsibility ads" for the purposes of this report had to have as their primary focus a clear, unambiguous message about drinking responsibly, not drinking and driving, or discouraging underage drinking. The alcohol industry placed 208,909 commercials promoting alcoholic beverages on television in 2001, compared to 2,379 responsibility ads. In auditing these ads, the Center on Alcohol Marketing and Youth finds the following: alcohol companies placed more than 87 product promotion commercials in 2001 for every ad about not driving after drinking or not drinking before age 21; alcohol companies placed 172 product promotion commercials on television in 2001 for every drinking and driving awareness ad; and alcohol companies placed 179 product promotion commercials on television in 2001 for every legal drinking age ad. (GCP)

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ED 477 964

# *Drops in the Bucket: Alcohol Industry "Responsibility" Advertising on Television in 2001*

## Report of the Center on Alcohol Marketing and Youth

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# DROPS IN THE BUCKET:

## Alcohol Industry "Responsibility" Advertising on Television in 2001

## Executive Summary

"...no one can match the alcohol industry's long-term commitment to public-service advertising that discourages underage drinking, along with warning adults to drink responsibly."

— Jeff Perlman, executive vice president-government affairs and general counsel, American Advertising Federation, December 19, 2002[1]

Alcohol abuse is the leading drug problem among America's youth. Youth alcohol-related motor vehicle deaths have risen in the past two years, despite a decline in the number of young people reporting drinking.[2] Alcohol continues to be closely associated with the three leading killers of kids: motor vehicle crashes and other unintentional injuries, suicides and homicides.[3]

Efforts to have alcohol included in the federal "drug czar's" anti-drug campaign have been defeated twice in Congress, although the federal anti-drug campaign has included some alcohol Public Service Announcements (PSAs) developed by other organizations in its "match" with networks, that is, in time slots donated by the networks. By default, therefore, alcohol companies have become the primary source of educational messages about alcohol abuse on television.

Following on its recent reports on alcohol advertising in national magazines[4] and on television,[5] the Center on Alcohol Marketing and Youth (CAMY) commissioned Virtual Media Resources (VMR), a media planning and research firm in Natick, Massachusetts, to analyze the alcohol industry's televised "responsibility" ads in 2001, using the same standard data sources and methodologies employed by media planning and buying professionals. While many alcohol ads include brief or small voluntary warnings (which research has found to be ineffective[6]), "responsibility ads" for the purposes of this report had to have as their primary focus a clear, unambiguous message about drinking responsibly, not drinking and driving, or discouraging underage drinking.

The alcohol industry placed 208,909 commercials promoting alcoholic beverages on television in 2001, compared to 2,379 responsibility ads. In auditing these ads, the Center on Alcohol

[1] J. Gaffney, "New Alcohol Study Refuted By Industry," *MediaDailyNews*, 19 December 2002, <http://www.mediapost.com/dtls_dsp_news.cfm?newsID+ 190256&newsDate=12/19/2002> (20 Dec 2002).

[2] National Highway Traffic Safety Administration, *Traffic Safety Facts 2001: Young Drivers*, (Washington, DC: National Center for Statistics & Analysis, 2002), 4; Centers for Disease Control and Prevention, "Notice to Readers: Alcohol Involvement in Fatal Motor-Vehicle Crashes—United States, 1999-2000," *MMWR Weekly*, 30 November 2002, <http://www.cdc.gov/mmwr/preview/mmwrhtml/mm5047a8.htm> (20 Dec 2002).

[3] American Medical Association, "Research and Facts about Youth and Alcohol," <http://www.ama-assn.org/ama/pub/category/3566.html>, (20 Dec. 2002).

[4] Center on Alcohol Marketing and Youth, *Overexposed: Youth a Target of Alcohol Advertising in Magazines*, (Washington, D.C.: Center on Alcohol Marketing and Youth, 2002). Available at <http://camy.org/research/files/overexposed0902.pdf>.

[5] Center on Alcohol Marketing and Youth, *Television: Alcohol's Vast Adland*, (Washington D.C.: Center on Alcohol Marketing and Youth, 2002), Available at <http://camy.org/research/files/television1202.pdf>.

[6] RJ Fox et al., "Adolescents' attention to beer and cigarette print ads and associated product warnings," Journal of Advertising 27 (3): 57-68 (1998).

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The Center on Alcohol Marketing and Youth

February 3, 2003

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Marketing and Youth finds the following:

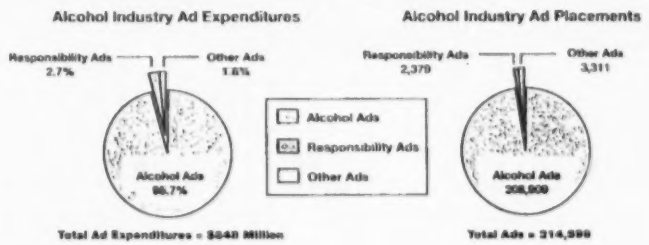
1. All told, alcohol companies placed more than 87 product promotion commercials in 2001 for every ad about not driving after drinking or not drinking before age 21. Spending on responsibility advertising accounted for less than 3% of the industry's television advertising budget.

2. Alcohol companies placed 172 product promotion commercials on television in 2001 for every drinking and driving awareness ad. More than twice as many adults[7] were exposed to these drinking and driving awareness ads as youth.

3. Alcohol companies placed 179 product promotion commercials on television in 2001 for every legal drinking age ad, and again more than twice as many adults were exposed to these ads discouraging underage drinking as youth.

In 2001, the alcohol industry spent a total of $811.2 million on measured television advertising for products, $23.2 million on responsibility TV advertising (ads about not drinking and driving and about the legal drinking age), and $13.4 million on other corporate, community and civic TV advertising.[8] Responsibility TV advertising represented 2.7% of expenditures and 1% of ad placements in 2001.

**Figure 1: Alcohol Industry Television Advertising in 2001**




Source: Competitive Media Reporting (CMR)

## Center on Alcohol Marketing and Youth www.camy.org

The Center on Alcohol Marketing and Youth at Georgetown University monitors the marketing practices of the alcohol industry to focus attention and action on industry practices that jeopardize the health and safety of America's youth. Reducing high rates of underage alcohol consumption and the suffering caused by alcohol-related injuries and deaths among young people requires using the public health strategies of limiting the access to and the appeal of alcohol to underage persons.

The Center is supported by grants from The Pew Charitable Trusts and the Robert Wood Johnson Foundation to Georgetown University.

## Virtual Media Resources

The Center commissioned Virtual Media Resources to conduct this analysis. Virtual Media Resources is a media research, planning, market analysis and consulting firm based in Natick, Massachusetts, serving communications organizations and marketers in a wide variety of market segments and media. VMR was established in 1992 to provide an independent research firm serving advertising agencies, and has grown to service over 100 clients across the US and Canada, including retail, publishing, financial, automotive, public health and other fields.

## Acknowledgements

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Joni Sims
Media researcher and consultant; former partner, Ogilvy & Mather/Mindshare; former Senior Client Executive, Nielsen Media Research

[7] For the purposes of this report, "adults" are defined as persons age 21 and above, and "youth" are persons ages 12 to 20.
[8] Examples of ads in this category included seasons' greetings ads and sympathy ads related to the events of September 11, 2001.



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# Introduction

Responsibility advertising includes any ads that warn against driving after drinking or encourage use of a designated driver, that advise viewers to drink responsibly, or that inform about the legal drinking age of 21. A total of $23.2 million was spent by the alcohol industry on responsibility advertising in 2001. This figure is 2.9% of the amount—$811.2 million—that the industry spent on product alcohol TV advertising in 2001. In 2001, product advertising generated more than 45 times the TV audience exposure (age 12+) of responsibility advertising.

Six alcohol beverage companies were reported by CMR to have bought responsibility advertising in 2001. Of these, two companies accounted for 95% of responsibility spending: Anheuser-Busch ($16.5 million) and Adolph Coors ($5.7 million).

**Table 1: Alcohol industry product and responsibility advertising 2001 by parent company**

| PARENT COMPANY<br>Sample Brands | Spent on Product Advertising | % of Company Total | Spent on Responsibility Advertising | % of Company Total | Spent on Other Advertising | % of Company Total | Total Advertising Expenditures |
|---|---|---|---|---|---|---|---|
| **ANHEUSER-BUSCH COS INC**<br>Budweiser, Bud Light, Bacardi Silver, Doc's Hard Lemonade | $242,266,970 | 91.8% | $16,460,644 | 6.2% | $5,136,532 | 1.9% | $263,864,146 |
| **PHILIP MORRIS COS INC**<br>Miller, Miller Lite | $188,672,808 | 95.9% | $476,252 | 0.2% | $7,645,655 | 3.9% | $196,794,715 |
| **ADOLPH COORS CO**<br>Coors, Coors Light, Keystone | $183,633,920 | 96.7% | $5,716,579 | 3.0% | $456,837 | 0.2% | $189,807,336 |
| **DIAGEO PLC**<br>Smirnoff, Smirnoff Ice, Johnnie Walker, Guinness | $44,046,264 | 99.0% | $423,107 | 1.0% | $3,500 | 0.0% | $44,472,871 |
| **FORTUNE BRANDS INC**<br>Absolut, Jim Beam | $ - | 0.0% | $141,304 | 100.0% | $ - | 0.0% | $141,304 |
| **INTERBREW SA**<br>Beck's, Labatt, Rolling Rock, St. Pauli Girl, Stella Artois | $10,243,408 | 100.0% | $57 | 0.0% | $ - | 0.0% | $10,243,465 |
| **OTHER COMPANIES** | $142,303,034 | 100.0% | $0 | 0.0% | $192,124 | 0.0% | $142,495,158 |
| **INDUSTRY TOTAL** | **$ 811,166,404** | **95.7%** | **$ 23,217,943** | **2.7%** | **$ 13,434,648** | **1.6%** | **$847,818,995** |

Source: CMR

## About This Report

This report focuses on the amount and placement of responsibility advertising on television by alcohol companies in 2001 and the effectiveness of alcohol companies' delivery of this advertising to the underage and adult population. Additionally, this report analyzes how the levels of advertising and placement strategies compare to those of alcohol product advertising on television in 2001.

All expenditures and occurrences for this report were classified and tracked by Competitive Media Reporting (CMR), an industry-standard source for advertising tracking and reporting. Television audience data for this analysis were provided by Nielsen Media Research, the industry-standard source for ratings, audience composition and population/universe estimates. "Responsibility" ads in this report were selected using a two-stage method. An initial set of commercials were identified using the summaries of ad creative copy provided by CMR. Verification was then accomplished by obtaining actual commercials from Video Monitoring Service (VMS) and subjecting them to review by staff at VMR.

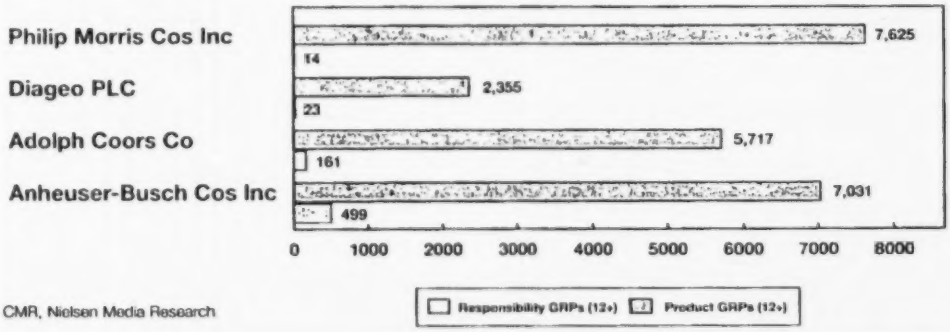
This report includes all advertising bought on network, national cable, and local broadcast stations. It does not include advertising bought directly on fledgling regional/local cable networks, Hispanic networks, and miscellaneous other sources, all of which are not covered by CMR or Nielsen. It also does not include television advertising paid for by alcohol industry associations or funded organizations, or alcohol company expenditures on alcohol education in venues outside of television advertising.

## Section 1: Product Advertising Overwhelms Responsibility Ads

Gross rating points (GRPs) are the television industry's standard measurement of how often and how many people viewed a program or commercial.[9] Based on a calculation of GRPs using data from Nielsen Media Research and CMR, both youth and adults were far more likely to see alcoholic beverage product advertising on television in 2001 than the alcohol companies' responsibility ads. The majority of alcohol advertisers ran no responsibility ads. The companies that did buy responsibility ads on television garnered audiences for those ads that were tiny fractions of the exposure gained for their product advertising:

- Philip Morris [Miller] product commercials had 545 times the exposure of their responsibility ads among audiences 12 and over.
- Diageo product commercials had 102 times the exposure of their responsibility ads among audiences 12 and over.
- Coors product commercials had 36 times the exposure of their responsibility ads among audiences 12 and over.
- Anheuser-Busch product commercials had 14 times the exposure of their responsibility ads among audiences 12 and over.

**Figure 2: Product Advertising Versus Responsibility Exposure by Parent Company**




Sources: CMR, Nielsen Media Research

[9] "A GRP is a unit of measurement of advertising audience size equal to one percent of the total potential audience universe. It is used to measure the exposure of one or more programs or commercials without regard to multiple exposure of the same advertising to individuals. A GRP is the product of media reach times exposure frequency." Office of National Drug Control Policy, "2.5 Gross Rating Points and Other Media Buying Information," *Testing the Anti-Drug Message in 12 American Cities: National Youth Anti-Drug Media Campaign Phase 1 (Report No. 2)*, March 1999, <http://mediacampaign.org/publications/message99/2_5.html>, (6 Jan 2003).



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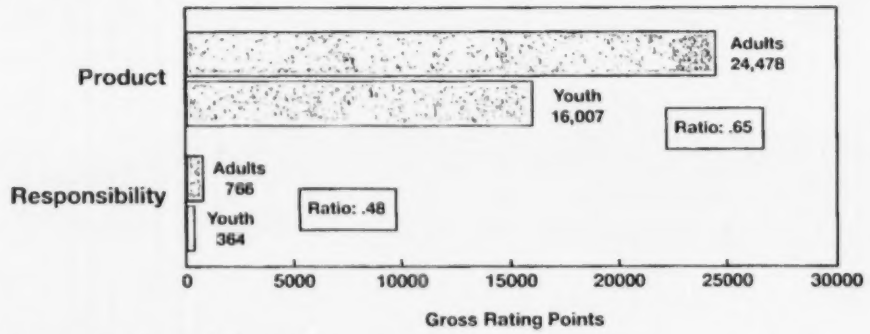
## Section 2: Youth More Effectively Reached by Product Than by Responsibility Ads

Alcohol industry responsibility ads fell into two categories: ads discouraging underage drinking (68% of responsibility spending) and drinking-driving awareness ads (32%). Compared to youth ages 12 to 20, adults were more than twice as likely to see the responsibility ads. CAMY's December 2002 report, *Television: Alcohol's Vast Adland*, found that youth saw roughly two alcohol product ads for every three ads seen by adults.[10] In contrast, youth saw slightly less than one responsibility ad for every two seen by adults.

**Figure 3: Youth vs. Adult Exposure to Alcoholic Beverage Product and Responsibility Ads, 2001***




*Includes only those companies with responsibility advertising.
Sources: CMR, Nielsen Media Research

### Ads Discouraging Drinking and Driving

Alcohol-related motor vehicle crashes claimed the lives of 17,448 people in 2001, including 2,950 persons under 21.[11] Alcohol companies spent $7.4 million, less than 1% of their television advertising budgets, on ads warning against drinking and driving. While six companies bought such ads (Anheuser-Busch, Adolph Coors, Philip Morris [Miller], Diageo, Fortune Brands and Interbrew), Anheuser-Busch and Coors accounted for 86% of the spending.

A total of 1,214 drinking and driving awareness ads were placed in 2001. In contrast, there were 172 times as many promotional ads for alcohol products. The drinking/driving ads reached approximately 47% of youth with an average of three exposures, compared to commercials promoting alcohol beverages which reached 89% of youth with an average of 245 exposures.

Ads on this topic had less than half the exposure among young people that they had among adults: 128 youth GRPs were delivered, versus 296 adult GRPs.

**Table 2: Comparing Reach and Frequency**

| AD TYPE | Reach | Frequency |
|---|---|---|
| PRODUCT ADS | 89% | 245 |
| RESPONSIBILITY ADS/ DRUNK DRIVING | 47% | 3 |
| RESPONSIBILITY AD/ UNDERAGE DRINKING | 56% | 4 |

Sources: CMR, Nielsen Media Research

[10] Center on Alcohol Marketing and Youth, *Television: Alcohol's Vast Adland*, 2.
[11] National Highway Traffic Safety Administration, *Traffic Safety Facts 2001: A Compilation of Motor Vehicle Crash Data from the Fatality Analysis Reporting System and the General Estimates System* (Washington, D.C.: National Center for Statistics and Analysis, 2002), 117.

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**Table 3: Drunk Driving/Safety Ad Spending by Parent Company**

| PARENT COMPANY | Expenditures | | # Ads | |
|---|---|---|---|---|
| | Drunk Driving | Product | Drunk Driving | Product |
| ADOLPH COORS CO | $2,089,817 | $183,633,920 | 244 | 38,780 |
| ANHEUSER-BUSCH COS INC | $4,304,968 | $242,266,970 | 550 | 38,611 |
| DIAGEO PLC | $423,107 | $44,046,264 | 16 | 15,399 |
| FORTUNE BRANDS INC | $141,304 | - | 140 | - |
| INTERBREW SA | $57 | $10,243,408 | 1 | 13,863 |
| PHILIP MORRIS COS INC | $476,252 | $188,672,808 | 263 | 37,301 |
| **Subtotal of selected companies** | **$7,435,505** | **$668,863,370** | **1,214** | **143,954** |

Source: CMR

## Ads Discouraging Underage Drinking

The National Highway Traffic Safety Administration (NHTSA) credits minimum age drinking laws setting the legal age for drinking at 21 in the 50 states with saving an estimated 20,000 young lives since the mid-1980s.[12] Alcohol companies spent a total of $15.8 million in 2001 on 1,165 ads about the legal drinking age. Only one legal-age drinking ad was placed on TV for every 179 product ads in 2001. The ads reached approximately 56% of youth with an average of four exposures, compared to commercials promoting alcoholic beverages, which reached 89% of youth with an average of 245 exposures.

The total exposure of youth to these ads was half that of adults (235 GRPs for youth versus 470 GRPs for adults).

Only two companies broadcast legal-age drinking ads: Anheuser-Busch ($12.2 million) and Coors ($3.6 million). Both companies spent significantly more on product advertising than on legal-age drinking ads. Anheuser-Busch spent 20 times more, and Coors spent 51 times more on product ads than on legal-age drinking ads.

Both brands were more successful in exposing adults to these ads than youth. Anheuser-Busch delivered 119% more GRPs to adults age 21+ (371 for adults, 169 for youth), and Coors delivered 50% more to adults (99 for adults, 66 for youth). Most of this advertising aired on three broadcast networks: NBC, ABC and CBS. No legal drinking age ads were placed on WB and UPN, the two networks with the most alcohol product advertising exposure to youth relative to adults, according to CAMY's recent television report.

**Table 4: Legal Drinking Age Ad Spending by Parent Company**

| PARENT COMPANY | Expenditures | | # Ads | |
|---|---|---|---|---|
| | Legal Age | Product | Legal Age | Product |
| ADOLPH COORS CO | $3,626,762 | $183,633,920 | 395 | 38,780 |
| ANHEUSER-BUSCH COS INC | $12,155,676 | $242,266,970 | 770 | 38,611 |
| **Subtotal of selected companies** | **$15,782,438** | **$425,900,890** | **1,165** | **77,391** |

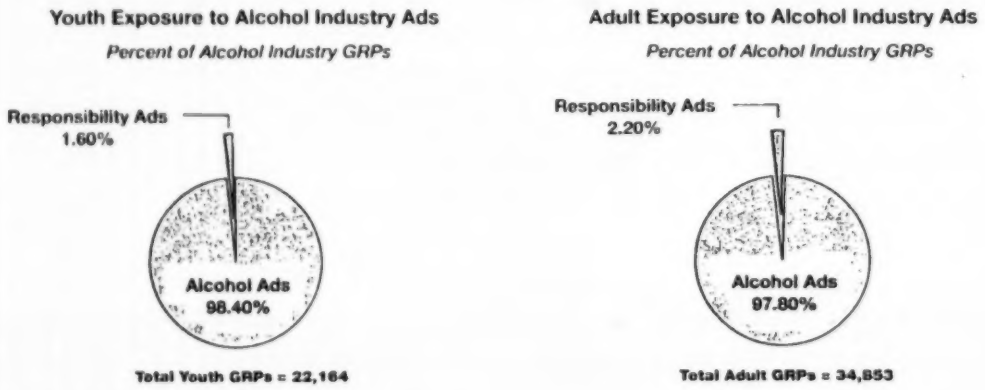
Source: CMR

[12] National Highway Traffic Safety Administration, *Traffic Safety Facts 2001: Young Drivers*, 5. See also P.M O'Malley and A.C. Wagenaar, "Effects of minimum drinking age laws on alcohol use, related behaviors and traffic crash involvement among American youth: 1976-1987," *Journal of Studies on Alcohol* 52 (5): 478-491 (1991).

## Conclusion

Alcohol companies and advertising industry representatives point to the industry's responsibility campaigns as evidence of the companies' commitment to preventing underage alcohol use and its negative consequences. The findings of this report show that alcohol companies are better at reaching young people with their product advertising than with their responsibility ads. This is true in absolute terms, but it is also true in comparison to adults. Relative to adults, youth had less exposure to responsibility advertising than they did to product ads.

**Figure 4: Youth versus Adult Exposure to Responsibility and Product Ads**




Sources: CMR, Nielsen Media Research

Alcohol companies have by default become the primary source of advertising that warns about potential health and safety consequences of alcohol use and informs the public about the minimum drinking age of 21. Past critical analysis of their responsibility ads from a public health perspective has questioned their efficacy.[13] Given the industry's track record on placement alone in 2001 as documented in this report, they are ineffective stewards of this important responsibility.

There have been numerous calls from public health and safety organizations for a national media campaign about alcohol use and consequences. Federally mandated tobacco counter-advertising in the early 1970s, aired at a ratio of one ad for every three or four product promotion ads, were sufficiently effective to prompt the tobacco industry to withdraw from advertising on television.[14] Recent experience with public health campaigns on tobacco use shows that national media campaigns can have a significant impact on youth substance use.[15] The Institute of Medicine (IOM) has been commissioned by Congress to develop a report, expected this spring, outlining the best way to conduct such a campaign in the context of a comprehensive approach to reducing underage drinking. The findings of this report from the Center on Alcohol Marketing and Youth underscore the importance of the IOM's work.

[13] W. DeJong, C. K. Atkin, and L. Wallack, "A Critical Analysis of 'Moderation' Advertising Sponsored by the Beer Industry: Are 'Responsible Drinking' Commercials Done Responsibly?" *The Milbank Quarterly* 70 (4): 661-678 (1992).

[14] Food and Drug Administration, "Regulations Restricting the Sale and Distribution of Cigarettes and Smokeless Tobacco Products To Protect Children and Adolescents; Proposed Rule Analysis Regarding FDA's Jurisdiction Over Nicotine-Containing Cigarettes and Smokeless Tobacco Products," *Federal Register* 60 (155): 41327, (11 August 1995), <http://www.access.gpo.gov/su_docs/fda/images/proprule.pdf>, (14 January 2003).

[15] M.C. Farrelly, et al, "Getting to the Truth: Evaluating National Tobacco Countermarketing Campaigns," *American Journal of Public Health* 92 (6): 901-907 (2002). See also L.K. Goldman and S. A. Glantz, "Evaluation of Antismoking Advertising Campaigns," *Journal of the American Medical Association* 279 (10): 772-777 (1998).



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